

# REQUEST FOR PROPOSAL CHECK-OFF LIST

All of these documents must be in the completed RFP file held by the State Procurement Bureau (SPB)

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\_\_\_\_\_ **Request from Agency/End User to SPB (Requisition)**

\_\_\_\_\_ **List of Vendors from Agency**

Agency provides a list of suggested vendors to SPB. SPB adds vendors as necessary.

\_\_\_\_\_ **Proposal Document**

Provided by the agency to SPB for review. RFP content will not be changed by SPB without the approval of the agency.

\_\_\_\_\_ **Mailing**

Prepared by SPB. RFP mailed via fax notice or U.S. mail.

\_\_\_\_\_ **Posted on Internet**

SPB posts RFP on SPB's website.

\_\_\_\_\_ **Pre-Proposal Conference and/or Site Survey Sign-In Sheet**

Agency is responsible for the pre-proposal conference and shall provide a copy of sign-in sheet to SPB. Conference may include a SPB Contracts Officer if the agency requests.

\_\_\_\_\_ **Addenda and/or Response to Vendor Questions** (including responses to the Q/A portion of the RFP)

Agency prepares the responses to questions submitted and/or communications from the pre-proposal conference and submits them to SPB for review, posting, and distribution.

\_\_\_\_\_ **Evaluation Matrix**

Prepared by the agency and provided to SPB for review and approval prior to receipt of proposals.

\_\_\_\_\_ **Non-Conflict of Interest Form**

Signed by all members of the evaluation committee, collected and returned to SPB.

\_\_\_\_\_ **Proposals Received**

Proposals are received at the SPB by the stated due date and time. The original proposal is kept at the SPB and copies are distributed to the agency for evaluation. One extra set is maintained at SPB for copying by interested persons.

\_\_\_\_\_ **Proposals Inspected**

Contracts officer inspects proposals for any claims of trade secret information. Contents and accompanying affidavit are pulled out and stored in a secure location. Interested parties are not allowed to inspect these documents.

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**List of Responding Vendors** is prepared by SPB for placement in the file.

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**All Public Meetings of the Evaluation Committee** are posted on the SPB's website. Meeting minutes are taken and kept as part of the official file by agency.

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**Requests for Clarification/Negotiation/Discussion**

A complete record of all negotiations with the vendor (oral and written). Includes requests/questions from agency and responses from vendors.

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**Best and Final Offers and Responses**

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**Recommendation of Award - Scoring, Explanation, Contract Amount, System Features/Options, Length of Contract, etc.**

This is prepared by the agency and submitted to SPB for concurrence. If evaluation and recommendation for award is appropriate, SPB prepares the letters to vendors. When evaluation of the RFP is complete, the agency submits all final copies to SPB.

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**Letters to Vendors** - Request for Documents Notice, No Award Letters. Sent out by SPB.

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**Proof of Compliance with Workers' Compensation Act**

If required in the Request for Documents Notice letter, the documentation is provided by the contractor(s) to SPB.

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**Certificate of Insurance** - State of Montana named as additional insured. The contractor(s) provides documentation to SPB.

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**Contract Security** - Approved as is appropriate.  
Same as above.

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**Negotiated Contract for Review** by SPB prior to signing contract - space on contract for contracts officer to approve negotiated items and contract language. SPB ensures no conflicting language between RFP and final contract.

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**Issue Purchase Order/Vendor Contract**

The issuance of a state purchase order or vendor contract completes the RFP process.

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**Confidential Documents**

Confidential documents accounted for and shredded by SPB.

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The State Procurement Bureau will handle any questions regarding the RFP process, including any requests to view the file. All further communications regarding the awarded contract are handled between the contractor and the agency.